APPRAISE
By Evaluation Services, Inc.
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Fast, Accurate, Easy and Economical
Historical Stock & Bond Valuations for Trusts & Estates
✓ First Class Service ✓ Innovative Technology ✓ IRS Accepted

Transforming Estate, Gift, & Trust Valuations Through Innovation

"Industry News & Helpful Hint" Newsletter

October 6, 2026

Trusts & Estates news article of the week:
"IRS finalizes increase in estate tax closing letter fee"

Extract: The IRS issued final regulations Thursday, increasing the user fee for an estate tax closing letter to $76 from $56 and adopting the proposed regulations issued in June without change.

Read the entire article by clicking **HERE**.

Helpful hint of the week:
"Questions regarding Web Appraise v2.1"

Web Appraise v2.1, released in August, has been well received. You can read the announcement we made by clicking **HERE**.

Here are answers to two recent client questions.

1. By default, Web Appraise saves portfolios to our system. Exporting a portfolio deletes it from our system and saves it to your system. Re-importing that portfolio puts it back in our system so you can continue working on it.
2. Sales are added using the "Add Sales" button on the Transactions page. You can add all other transactions using the "Add Note" button. This lets you manually enter your transactions.

If you have questions, please email us at **clientinfo@appraisenj.net**

Last week's Trusts & Estates news article:
"The Great Wealth Transfer Is Arriving – Just Not The Way Anyone Planned"

Last week's Helpful Hint:
"How Does The Cost Basis Calculator Work?"

Read more HERE

Notes:

Avoid sending portfolios for pricing between Saturday at 8:00 PM and Sunday at 8:00 AM Eastern Time. Intercontinental Exchange (ICE), our data provider, is offline during that time for maintenance.

Need a trusted partner for your estate, gift, or trust tax valuations?
Let **Evaluation Services Inc. (ESI-APPRAISE)** simplify the process.
📞 Call us at **201-784-8500 x113** or **Email us** today.

Our vision is **"Transforming Estate, Gift, & Trust Valuations Through Innovation."** Providing each client with flexibility and choice. **That's why we offer six distinct ways to obtain IRS-compliant valuations**, ensuring the perfect fit for your firm's size, technical capabilities, and risk profile. No other provider offers this level of versatility.

We invite you to explore our solutions and discover how ESI can help you streamline your processes while maintaining accuracy and compliance.

Category	Solution(s)	Values

Enterprise & Automation Ideal for large-scale operations.	1.Appraise API	1. **Scalable Automation:** Secure system-to-system data transfer with zero manual processes.
Convenience & Integration Ideal for cutting infrastructure costs.	2.Web Appraise 3.ESI-Direct	2. **Data Control Flexibility:** Choose to store trust and estate portfolios in our secure private cloud or directly within your firm's own infrastructure (on-premises). Eliminates IT overhead and manages risk. 3. **Native Software Integration**: Direct, seamless integration with ONESOURCE Trust and Estate Administration software. No manual file exports/imports needed.
Specialty & Risk Mitigation Ideal for reducing risk exposure.	4. Appraise Outsourcing 5. Appraise Software 6. Appraise SaaS *Requires IT involvement to manage third-party Citrix software	4. **Turnkey Expert Service:** Complete quality assurance where our team handles the valuation work for you. 5. **On-Premises Local Control:** Full local data control that mitigates risk by storing files directly on local network servers. 6. **Hybrid Convenience & Risk Mitigation:** Combines the browser accessibility of the web with robust enterprise-level risk mitigation.

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We follow the NYSE & NASDAQ holiday schedule

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